



TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) average annual unemployment rate for April 2004 was 4.0 percent, as shown in Treasure Valley Table 1. This was two-tenths of a percentage point below the March 2004 rate of 4.2 percent and 1.7 percentage point below the April 2003 rate of 5.7 percent. Month-over-month, the number of employed persons increased by 1,800, or 0.7 percent, from March 2004 while the number of unemployed individuals decreased by 600 individuals, or 5.6 percent. The increasing number of persons employed and the decreasing number of persons unemployed created an overall increase of 1,200 individuals, or 0.5 percent, in the *Civilian Labor Force*, from March 2004. Year-over-year, the number of employed persons increased by 9,400, or 4.0 percent, and the number of unemployed individuals decreased by 4,000 individuals or 28.4 percent, creating a net increase in the *Civilian Labor Force* of 5,400 individuals,

Treasure Valley Table 2: April 2004
Seasonally Adjusted Labor Force Figures for
Southwest Idaho Counties

	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	181,529	6,221	3.4	175,308
Adams	1,547	174	11.3	1,373
Boise	2,468	139	5.6	2,328
Canyon	71,972	3,853	5.4	68,119
Elmore	9,255	490	5.3	8,766
Gem	5,487	349	6.4	5,137
Owyhee	4,318	65	1.5	4,253
Payette	9,738	817	8.4	8,920
Valley	3,689	257	7.0	3,432
Washington	4,234	394	9.3	3,840
Statewide	699,140	30,415	4.4	668,725

Treasure Valley Table 1: Boise MSA Labor Force & Employment
Ada and Canyon Counties

	April 2004*	Mar 2004	April 2003	% Change Last Month	% Change Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	253,500	252,300	248,100	0.5	2.2
Unemployment	10,100	10,700	14,100	-5.6	-28.4
% of Labor Force Unemployed	4.0	4.2	5.7		
Total Employment	243,400	241,600	234,000	0.7	4.0
Unadjusted					
Civilian Labor Force	252,700	252,300	247,000	0.2	2.3
Unemployment	10,300	11,600	14,000	-11.2	-26.4
% of Labor Force Unemployed	4	5	6		
Total Employment	242,400	240,700	233,000	0.7	4.0
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	236,100	233,800	228,100	1.0	3.5
GOODS-PRODUCING INDUSTRIES	46,500	45,800	44,700	1.5	4.0
Natural Resources & Construction	16,300	15,700	15,100	3.8	7.9
Manufacturing	30,200	30,100	29,600	0.3	2.0
Durable Goods	23,300	23,200	22,500	0.4	3.6
Wood Product Manufacturing	1,600	1,600	1,800	0.0	-11.1
Fabricated Metal Products Mfg.	1,300	1,300	1,400	0.0	-7.1
Machinery Manufacturing	1,100	1,100	1,200	0.0	-8.3
Computer & Electronic Manufacturing	14,900	14,800	14,300	0.7	4.2
Transportation Equipment Mfg.	1,500	1,500	1,700	0.0	-11.8
Other Durable Goods	2,900	2,900	2,100	0.0	38.1
Nondurable Goods	6,900	6,900	7,100	0.0	-2.8
Food Manufacturing	5,100	5,100	5,400	0.0	-5.6
Printing & Related Support Activities	700	700	800	0.0	-12.5
Other Nondurable Goods	1,100	1,100	900	0.0	22.2
SERVICE-PROVIDING INDUSTRIES	189,600	188,000	183,400	0.9	3.4
Trade, Transportation, & Utilities	44,800	44,500	43,700	0.7	2.5
Trade	37,800	37,500	36,700	0.8	3.0
Wholesale Trade	9,900	9,800	10,100	1.0	-2.0
Wholesalers, Durable Goods	6,300	6,100	6,400	3.3	-1.6
Wholesalers, Nondurable Goods	2,800	2,800	2,900	0.0	-3.4
Retail Trade	27,900	27,700	26,600	0.7	4.9
Food & Beverage Stores	4,300	4,300	4,100	0.0	4.9
General Merchandise Stores	6,200	6,000	5,700	3.3	8.8
All Other Retail Trade	17,400	17,400	16,800	0.0	3.6
Transportation, Warehousing, & Utilities	7,000	7,000	7,000	0.0	0.0
Utilities	600	600	600	0.0	0.0
Transportation & Warehousing	6,400	6,400	6,400	0.0	0.0
Information	4,100	4,000	3,900	2.5	5.1
Telecommunications	1,500	1,500	1,400	0.0	7.1
Financial Activities	12,800	12,700	12,300	0.8	4.1
Finance & Insurance	9,400	9,300	9,100	1.1	3.3
Real Estate & Rental & Leasing	3,400	3,400	3,200	0.0	6.3
Professional & Business Services	33,600	33,000	31,500	1.8	6.7
Professional, Scientific, & Technical	10,700	10,700	10,300	0.0	3.9
Management of Companies & Ent.	5,500	5,500	5,600	0.0	-1.8
Administrative & Support & Waste Mgmt.	17,400	16,800	15,600	3.6	11.5
Educational & Health Services	30,300	30,200	28,300	0.3	7.1
Educational Services	2,400	2,700	2,500	-11.1	-4.0
Health Care & Social Assistance	27,900	27,500	25,800	1.5	8.1
Hospitals	9,900	9,700	9,100	2.1	8.8
Leisure & Hospitality	20,800	20,400	20,000	2.0	4.0
Arts, Entertainment, & Recreation	2,900	2,700	2,700	7.4	7.4
Accommodation & Food Services	17,900	17,700	17,300	1.1	3.5
Accommodation	1,900	1,900	1,900	0.0	0.0
Food Services & Drinking Places	16,000	15,800	15,400	1.3	3.9
Other Services	6,800	6,700	6,700	1.5	1.5
Total Government	36,400	36,500	37,000	-0.3	-1.6
Federal Government	5,600	5,500	5,300	1.8	5.7
State & Local Government	30,800	31,000	31,700	-0.6	-2.8
State Government	13,500	13,600	13,900	-0.7	-2.9
State Government Education	4,100	4,100	4,300	0.0	-4.7
State Government Administration	9,400	9,500	9,600	-1.1	-2.1
Local Government	17,300	17,400	17,800	-0.6	-2.8
Local Government Education	10,900	11,000	10,600	-0.9	2.8
Local Government Administration	6,400	6,400	7,200	0.0	-11.1

* Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

or 2.2 percent, in the *Civilian Labor Force* from April 2003. The *Civilian Labor Force* figures for April 2004 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 2.

In the Boise City MSA *Nonfarm Payroll Jobs* increased by 2,300 jobs or 1.0 percent in April 2004, while year-over-year, *Nonfarm Payroll Jobs* experienced a gain of 8,000 jobs or 3.5 percent. Month-over-month, *Goods-Producing Industries* gained 700 jobs with job increases noted in *Natural Resources, Mining & Construction* (600 jobs) and *Computer & Electronic Product Manufacturing* (100 jobs) while all other *Goods-Producing Industries* remained steady from last month. Year-over-year, *Goods-Producing Industries* gained 1,800 jobs with job increases noted in *Natural Resources, Mining, & Construction* (1,200 jobs), *Computer & Electronic Product Manufacturing* (600 jobs), *Other Durable Goods Manufacturing* (800 jobs), and *Other Nondurable Goods Manufacturing* (200 jobs) while job losses were noted in *Wood Product Manufacturing* (-200 jobs), *Fabricated Metal Products Manufacturing* (-100 jobs), *Machinery Manufacturing* (-100 jobs), *Transportation Equipment Manufacturing* (-200 jobs), *Food Product Manufacturing* (-300 jobs), and *Printing & Related Support Activities* (-100 jobs). The news continues to be generally good for the MSA's *Computer & Electronic Product Manufacturing* industry in that there has been a job gain every month since September 2003.

In *Service-Providing Industries*, jobs gained outweighed jobs lost; 1,600 jobs were gained in the Boise City MSA from March to April 2004. Job gains were experienced in *Durable Goods Wholesale Trade* (200 jobs), *General Merchandise Stores* (200 jobs), *Information Services* (100 jobs), *Finance & Insurance Services* (100 jobs), *Administrative & Support & Waste Management Services* (600 jobs), *Health Care & Social Assistance Services* (400 jobs) including *Hospitals* (200 jobs), *Arts, Entertainment, & Recreation Services* (200 jobs), *Food Service & Drinking Places* (200 jobs), *Other Services* (100 jobs), and *Federal Government* (100 jobs). Job losses occurred in *Educational Services* (-300 jobs), *State Government Administration* (-100 jobs), and *Local Government Education* (-100 jobs). Year-over-year, *Service-Providing Industries* gained 6,200 jobs or 3.4 per-

cent. Job gains were noted in *Food & Beverage Stores* (200 jobs), *General Merchandise Stores* (500 jobs), *All Other Retail Trade* (600 jobs), *Information Services* (200 jobs) including *Telecommunications Services* (100 jobs), *Finance & Insurance Services* (300 jobs), *Real Estate & Rental & Leasing Services* (200 jobs), *Professional, Scientific, & Technical Services* (400 jobs), *Administrative & Support & Waste Management Services* (1,800 jobs), *Health Care & Social Assistance Services* (2,100 jobs) including *Hospitals* (800 jobs), *Arts, Entertainment, & Recreation Services* (200 jobs), *Food Service & Drinking Places* (600 jobs), *Other Services* (100 jobs), *Federal Government* (300 jobs), and *Local Government Education* (300 jobs). Job losses were noted in *Durable Goods Wholesale Trade* (-100 jobs), *Nondurable Goods Wholesale Trade* (-100 jobs), *Management of Companies & Enterprise Services* (-100 jobs), *Educational Services* (-100 jobs), *State Government Education* (-200 jobs), *State Government Administration* (-200 jobs), and *Local Government Administration* (-800 jobs).

SPECIAL TOPIC: Per Capita Personal Income Update

The Bureau of Economic Analysis released Per Capita Personal Income (PCPI) figures in May. Treasure Valley Table 3 shows the changes in PCPI for all counties in Southwest Idaho. Blaine County in South Central Idaho is ranked number one, followed by Ada and Valley Counties. In terms of actual growth, Elmore County had the largest percentage increase from 2001 to 2002—6.6 percent—while Valley County showed the largest dollar in-

Treasure Valley Table 3: Per Capita Personal Income

County/Area	2001	2002	change	% change	State rank
Ada County	\$ 33,771	\$ 34,072	\$ 301	0.9	2
Adams County	22,546	23,189	643	2.9	17
Boise County	21,650	22,309	659	3.0	21
Canyon County	19,747	19,432	(315)	-1.6	41
Elmore County	20,768	22,138	1,370	6.6	23
Gem County	19,922	19,753	(169)	-0.8	38
Owyhee County	19,342	19,799	457	2.4	37
Payette County	19,727	20,016	289	1.5	36
Valley County	28,717	30,351	1,634	5.7	3
Washington County	19,480	20,281	801	4.1	34
Boise City MSA	28,811	28,878	67	0.2	
State of Idaho	24,947	25,476	529	2.1	
United States	30,527	30,906	379	1.2	

crease, which was \$1,634. The PCPI and state ranking among all counties in Southwest Idaho are as follows: Ada County (2) increased \$301 to a PCPI of \$34,072; Adams County (17) increased \$643 to a PCPI of \$23,189; Boise County (21) increased \$659 to a PCPI of \$22,309; Canyon County (41) decreased \$315 to a PCPI of \$19,432; Elmore County (23) increased \$1,370 to a PCPI of \$22,138; Gem County (38) decreased \$169 to a PCPI of \$19,753; Owyhee County (37) increased \$457 to a PCPI of \$19,799; Payette County (36) increased \$289 to a PCPI of \$20,016; Valley County (3) increased \$1,634 to a PCPI of \$30,351; and Washington County (34) increased \$801 to a PCPI of \$20,281. The Boise City MSA had an increase of \$67 from 2001 to a 2002 PCPI of 28,878; the State of Idaho had an increase of \$599 from 2001 to a 2002 PCPI of \$25,476; and the United States increased \$379 to a PCPI of \$30,906 in 2002. While the MSA's PCPI is 113.4 percent of the state's, it is 93.4 percent of the nation's Per Capita Personal Income.

AREA DEVELOPMENTS

Boise City MSA

- SCP Global Technology recently announced the closure of its Germany manufacturing facility; the company will consolidate all of its manufacturing operations at its Boise facility. The closure in Germany will not bring additional jobs to Boise. SCP's Boise facility has the ability to more than triple its current manufacturing capacity, when needed.
- More than 1,500 students graduated from Boise State University (BSU) in May. Approximately 1,100 graduates attended the ceremony. The spring 2004 graduating class was the largest in BSU's history.
- A new 21,000-square-foot multi-tenant retail building is planned for the northeast corner of Cole Road and Denton Street near the Boise Towne Square, next to the I-84 connector off-ramp in Boise. Construction of Towne Square Plaza is expected to begin in November with completion set for February 2005.
- Six one-story office buildings are currently planned for 2.15 acres of unused farmland on South Five Mile Road, north of Victory. The development will accommodate a combined 17,280-square feet of professional office space. Construction of the \$1.2 million project, if approved by Ada County Commissioners, will start in July.
- Fred Meyer announced plans to transfer its eastern regional office from Salt Lake City to Boise in June. The regional office, one of six regional headquarters, will oversee 10 Fred Meyer stores in Idaho as well as several stores in eastern Washington.
- A new senior community and professional office development is currently being planned for south Meridian. Spring Creek Senior Living Community and Spring Creek Professional Office Park will be located on 9.5 acres of land bordered by Idaho 69 to the west, the Meridian Greens subdivision to the east, and Calderwood Road to the north. Construction of the senior facilities, including an assisted-living center and an Alzheimer's disease care building is scheduled to start in fall 2004.
- ZiLOG's planned closure of its Nampa semiconductor plant is still set for June, putting about 150 people out of work. ZiLOG employees will be offered severance packages and bonus incentives. The company is based in San Jose, California, and will outsource its semiconductor manufacturing to a company in Lubbock, Texas.
- YMCA held a groundbreaking for its new facility in Caldwell in early May. The groundbreaking celebration included music, traditional Mexican dance, and skydivers at its location near Brothers Park. More than 600 people attended the Caldwell YMCA groundbreaking. Construction has already started on the \$13.5 million center, which is scheduled to open in September 2005.
- Other recent business happenings in the Boise City MSA includes: Continental Airlines announced plans to offer two daily flights between Boise and Houston starting in July; Ada County completed its \$6.8 million county jail expansion, adding 308 new beds to the facility; Fastenal, a marketer of industrial and construction supplies, moved from its location on Airport Way to a new building on the east side of Orchard Street, north of I-84; Ann Taylor Loft and Function Clothing will open retail outlets in the BoDo development in downtown Boise; Bidstoboxes.com, which helps small businesses

utilize the Internet to maximize the value of excess assets and inventories, opened at 930 North Cole Road in Boise; Rampage Gaming opened a new Treasure Valley gaming center on Broadway Avenue, near Boise Avenue in Boise; Peter Schott sold Schott's Rodizio Grille to Jim Borton Jr., who will rename the restaurant Borton's Steaks, Seafood and Spirits and change the concept of the restaurant, located in the Idanha Hotel in downtown Boise; Black Door Designs opened an office at 6332 Gateway in Boise; EmergeCore Networks expanded into new facilities in the Boise Research Center in northwest Boise; Nick's Shoe Store closed its business in downtown Boise; Fisher's recently launched a new company, Digital Printing and Imaging (DPI) located at 595 East 42nd Street in Garden City, to sell and service Lanier equipment; GeoTek, Inc., an environmental services consulting firm, opened an office on East Corporate Drive in Meridian; a Wendy's franchise and two multi-tenant retail buildings are planned for the west side of Eagle Road, south of Fairview Avenue in Meridian; PetsMart opened a new retail outlet at 1220 North Eagle Road in the Crossroads Shopping Center in Meridian; Our Secret Garden and Gayle's Loft of Books opened in units G and F at 172 West State Street in Eagle; St. Luke's Regional Medical Center purchased 14 acres on the south side of State Street (across from the Home Depot) in Eagle for a future outpatient facility; Taco Del Mar opened a new eatery in Eagle at 13613 W. McMillan Road; Kabloom Florist opened in Eagle at 3210 East Chinden Boulevard, Suite 132; Group One opened a new real estate office in Eagle at 661 South Rivershore Lane, Suite 200; the Nampa Edwards Jones office plans to relocate to 176 Second Street South in Nampa; and TitleOne Corporation opened a second Nampa escrow office in early June at 316 Twelfth Avenue Road.

Adams County

- Brundage Mountain Resort announced in early May that it set a record for skier visits during the 2003-2004 season. Skier visits were up about 7.0 percent, and the resort reported 122,430 skier visits for 2003-2004; this is the third consecutive year that Brundage has broken the record for most skier visits in the resort's history.

- The State of Idaho recently awarded the City of Council \$550,000 for two separate projects: \$500,000 for downtown revitalization and \$50,000 for improvements to the senior center. The downtown revitalization grant is part of a five-year planning effort connected to the Highway 95 alternate route project. The money was part of the Idaho Department of Commerce's Idaho Community Development Block Grants Program (ICDBG). This year, the ICDBG program awarded nearly \$7 million for water/sewer, downtown redevelopment, and senior center projects in Idaho communities.

Valley County

- Tamarack will spend \$52 million through 2004 on major construction projects, which will include installing two detachable quad chairlifts, a four-story Members Lodge for The Club at Tamarack Resort, 42 cottages and chalets, a rough cutting of the resort's golf course, three additional ski lifts, 25 home estates, and three stone bridges for Nordic skiing. Also, three new ski slopes will be carved, eight miles of new mountain bike trails will be cut, multiple landscaping projects will continue, and more road and utility constructions projects will be completed. Tamarack also recently received approval to use about 9 acres of its land for a plant nursery, temporary construction yard, and temporary RV park. Construction workers and contractors working on projects throughout Tamarack Resort will use the RV park. There is a two-year limit per occupant.

Washington County

- The State of Idaho recently awarded the City of Weiser \$330,000 to assist the city in its Water Treatment Plant Improvement Project. The money was part of the Idaho Department of Commerce's Idaho Community Development Block Grants Program (ICDBG).

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